

Platform team roles and responsibilities

What's in this Success Insight

You need the right individuals and skill sets on your core ServiceNow team and the right buy-in and support from your extended ServiceNow team to successfully implement and maintain your Now Platform® and to realize maximum value from ServiceNow. This overall platform team will be dedicated to establishing, maintaining, and extending ServiceNow as a strategic business platform in your organization.

This Success Insight will address the following key questions:

1. When should I construct my initial platform team?
2. Who should own the platform team makeup?
3. What are the minimum roles and related responsibilities for my core platform team?
4. What are the additional roles and responsibilities to consider for my core platform team?
5. What are the roles and responsibilities for my extended platform team?

Remember this!

This template is meant to be a starting point for driving staffing decisions, but it's not intended to be one size fits all for every organization. Depending on the size of your organization and the extent that you're using ServiceNow and partners to augment your staff, individuals might wear multiple hats. As you grow and evolve your use of the platform, consider splitting out any combined roles to help drive focus and enable long-term scale.

Key insights

1. When should I construct my initial platform team?

Construct your initial platform team early in the implementation prior to the project kickoff. Make sure to revisit these roles and responsibilities at critical milestones, such as in your transition to

long-term maintenance and continuous improvement, when you implement additional platform capabilities, or when there are significant changes in your business that impact the way you need to manage the platform.

2. Who should own the platform team makeup?

The platform owner and executive sponsor for ServiceNow should co-own the core platform team makeup. Also make sure to involve human resources and relevant senior leaders, as necessary.

3. What are the minimum roles and related responsibilities for my core platform team?

The core platform team is responsible for the day-to-day management and maintenance of the Now Platform. This team provides overall strategic direction, ongoing administration, and extends ServiceNow as a strategic platform across the business. Here is a nonexhaustive list of our recommended roles and responsibilities.

Core platform team – Minimum roles and responsibilities

- **Executive sponsor** – A senior leader who oversees the ServiceNow strategic roadmap and makes sure it aligns to measurable business outcomes
 - Creates and enforces the strategic vision and direction for the platform, including outcomes to be delivered
 - Establishes the relevance of the platform within the enterprise
 - Leads strategy governance meetings as part of the executive steering committee and acts as the executive point of approval authority and the final point of escalation for all decisions and policies that govern the Now Platform
 - Builds out a funding model for the Now Platform
 - Partners with the platform owner to make sure platform capabilities are aligned with the vision and strategy
 - Sets guiding principles and success criteria for projects, removes barriers for completion, and approves closing projects
- **Platform owner** – A senior leader who is ultimately accountable for the Now Platform
 - Supports creating the overall roadmap and shapes demand for enterprise platform consumption
 - Ensures platform team alignment with the business strategy, roadmap, and platform governance policies

- Has ownership and oversight of the ServiceNow instances, the core platform team, and any escalations
- Maximizes value by identifying additional business outcomes the platform allows
- Presides over the technical governance board and is involved in all governance components
- Presides over design configuration decisions to ensure a seamless user experience that aligns with the platform design strategy
- **Project manager or scrum master** – A single point of contact for overall project status; often referred to as a *project manager* in organizations employing a waterfall methodology or *scrum master* for those employing an agile methodology
 - Acts as primary point of contact for customer resources, project activities, and escalations as required to achieve expected outcomes
 - Plans project scope and establishes measurable goals
 - Establishes the project's timelines and manages the project, including escalations, to complete the project on schedule and within budget
 - Works closely with the ServiceNow engagement manager and all other team members to plan, manage, and deliver releases
 - Attends project governance meetings and scrum meetings, if applicable
 - Organizes the project kickoff and process workshop(s)
 - Facilitates activities through training, testing, go-live, and post go-live support
- **OCM lead** – An individual or group of individuals who focus on organizational change management activities; should include a trainer, training coordinator, communication lead, etc. depending on your size and needs
 - Assesses group and individual training needs
 - Creates and maintains training materials
 - Plans, develops, and delivers comprehensive learning programs
 - Responsible for training the platform team and the entire organization on how to use the platform for the best employee experience
 - Coordinates customer training activities, including the training plan and training execution
 - Coordinates all decisions and execution of internal communications to stakeholders related to the deployment of ServiceNow
 - Delivers internal information according to a communications plan to prepare the organization for the Now Platform and its functionality

Note: OCM spans beyond just initial implementation activities. Most organizations will have a dedicated trainer separate from other OCM responsibilities. Project managers often own coordination.

- **Business analyst** – A liaison between the business and the platform team
 - Captures business and user requirements (as stories for agile shops)
 - Ensures requirements are understood, developed, tested, and delivered to specification
 - Owns the relationship with project stakeholders to identify, prioritize, model, and document business, process, and data requirements
 - Represents project stakeholders throughout planning, development, and release processes
 - Works with the platform team to develop release estimates
 - Supports the testing effort
 - Works with stakeholders to drive adoption
- **Platform administrator** – A technical resource who performs the day-to-day administration of the platform
 - Maintains the stability and usability of the platform across production and non-production environments
 - Performs application maintenance to include performance monitoring and error identification and remediation
 - Manages support for incidents
 - Leads upgrade planning and execution
 - Manages instance security: user/group access, administration, access control lists. etc.
 - Provides configuration assistance to developers
- **Platform architect** – A technical leader who documents the overall platform design and helps to analyze the impact of new requirements
 - Ensures platform alignment with the business strategy
 - Provides consultative technical leadership to the platform team
 - Creates and maintains a detailed view of the existing architecture
 - Provides architectural controls to ensure the correct technical solutions are used when delivering business solutions
 - Resolves technical escalations, including responding to defects
 - Participates in process workshops
 - Works closely with enterprise architecture team

- Assists in migrating configuration across instances
- Often the integration expert in the absence of a dedicated role
- **Infrastructure security/security administrator** – A person or group who oversees the security of the Now Platform
 - Ensures the instance is secure and hardened as needed (domain separation, Edge Encryption, etc.)
 - Creates and enforces security standards throughout the platform
 - Protects resources in the platform with tools like ACLs
 - Ensures users have the correct access
 - Audits security logs of the platform
 - Confirms the technical design and integration requirements with various systems to support processes that require data exchange
 - Participates in workshops when security must be considered

Note: If possible, consider having different security team members own disparate parts of the system, such as one for ITSM, ITOM, etc.

- **Quality assurance lead** – An individual or group of individuals who focus on validating that the platform functionality works as expected
 - Possesses knowledge of the Now Platform and applications and how they're used internally and can interpret and validate technical specifications and designs
 - Validates the application functionality built by developer(s) and the system administrator prior to promoting configuration into production
 - Creates test plans and coordinates test activities, including unit testing, system testing, and user acceptance testing
 - Coordinates customer testing activities, including the test plan, test cases, and test execution
- **Developer** – An individual who owns most configuration work in the platform
 - Designs, develops, configures, and customizes (when necessary) ServiceNow applications and services
 - Delivers new functionality across applications
 - Supports the entire development lifecycle
 - Assists the platform administrator with incident resolution

Note: This role can be thought of as a junior platform administrator.

4. What are the additional roles and responsibilities to consider for my core platform team?

The roles and responsibilities below should be considered as part of the core platform team but are often performed by other roles, especially in smaller organizations. Consider having an FTE for each of these as the platform and your organization evolve and when budget is available. Here is a nonexhaustive list of our additional roles and responsibilities to consider.

Core platform team – Additional roles and responsibilities

- **Demand manager** – A liaison between business and IT responsible for collecting new demand from business stakeholders
 - Manages day to day demand management
 - Enhances initial demand requests
 - Responsible for the demand assessment process to prioritize and approve demands
 - Presides over the portfolio governance demand board

Note: The platform owner often performs this role.

- **Data insights and analytics owner** – An individual responsible for the overall reporting, metrics, and KPIs for the platform
 - Builds out dashboards and reports to deliver to senior management
 - Responsible for measuring the Now Platform's ROI

Note: The platform owner often performs this. More mature organizations often have a data insights owner for each business unit but it's better to have one point of contact.

- **Data manager** – An individual who is ultimately accountable for the configuration management database (CMDB)
 - Overall accountability for managing and maintaining data/IT configuration items and data governance for the platform
 - Ensures CMDB is current, accurate, and stable
 - Maintains data dictionary
 - Owns data model for the platform
 - Defines KPIs to manage the effectiveness of the data
 - Responsible for data integrations such as Discovery or 3rd party solutions to enrich CI's in the CMDB
 - Promotes awareness and acceptance of the CMDB
 - Ensures CMDB is linked to business objectives

Note: This role is often performed by the platform architect, platform administrator, or an ITOM process owner.

- **Integration expert** – A person who oversees the implementation and maintenance of platform integrations
 - Determines which integration method(s) will be used, integration directionality, and attributes
 - Participates in any data normalization required prior to being imported / inserted into ServiceNow
 - Participates in platform, process, and integration testing

Note: This role is often performed by the platform architect.

5. What are the roles and responsibilities for my extended platform team?

The extended platform team is responsible for providing the business support that makes using ServiceNow as a strategic platform possible. These individuals are pulled in on an as-needed basis and would likely exist in the absence of ServiceNow. They're often viewed as shared services resources. Here is a nonexhaustive list of our recommended roles and responsibilities.

Extended platform team – Roles and responsibilities

- **Process or service owner** – A senior leader within each business unit for each major process or service (e.g., incident, change, employee onboarding) who is accountable for ensuring the process is fit for purpose
 - Defines the process/service mission, vision, tactics, goals, objectives and KPIs
 - Provides the authority to affect process change, including continuous improvement opportunities
 - Documents and maintains the process and procedures
 - Participates in requirements discussions and helps to resolve cross-functional conflicts
 - Reviews stories for accurate definition and acceptance criteria
 - Ensures consistent execution of the process across the organization
 - Provides formal process testing and UAT sign-off
 - Reports on the effectiveness of the process to senior management
 - Works closely with platform owner and demand manager to prioritize the relevant backlog

Note: Some organizations combine the process/service owner and process manager into one role. Consider splitting these out as your organization and use of ServiceNow evolves.

- **Process manager** – Someone who is accountable for the end-to-end execution of a process
 - Acts as primary point of contact for customer resources, project activities, and escalations as required to achieve outcomes on schedule and on budget
 - Attends project governance meetings
 - Reviews and contributes to project status reports and identifies improvement opportunities
 - Organizes any project kick-offs and process workshop(s)
 - Actively participates in project and scrum meetings
 - Trains and manages resources
 - Works closely with the ServiceNow Engagement manager and all other team members to plan, manage, and deliver releases

Note: Some organizations combine the process/service owner and process manager into one role. Consider splitting these out as your organization and use of ServiceNow evolves.

- **Subject matter experts/business partners** – Senior-level experts in a certain process or business unit who can translate requirements to IT
 - Possesses in-depth functional and technical understanding of any necessary processes and functions in the business
 - Work closely with platform owner and demand manager on tying business to IT requirements, including new demands
 - Provides advice on how business services are delivered with a vision for improvement
 - Take an advisory role in the configuration of the ServiceNow Platform
 - Participates in process story discussions
 - Participates in unit testing and user acceptance testing
- **Enterprise architect** – Someone who provides a holistic view of the organization's strategy, processes, and other systems, including any policy or organizational requirements
 - Responsible for the creation, maintenance and management of IT architecture models
 - Supports roadmap development and delivery through technical direction and decision making
 - Supports positioning ServiceNow with overall technical landscape and ensures foresight in direction, platform consumption, and integration across systems
 - Participates in governance processes and works closely with platform architect

- Helps guide the process owners to align with technical or functional standards
- **IT risk and compliance lead/information security** – An individual or group that makes sure the organization's security protocols and best practices are followed within the Now Platform
 - Responsible for making sure platform security administrator is up to speed on organization's overall security governance process
 - Provides proactive security guidance to the project team during initiation phase
 - Reviews and communicates feedback on all the mandatory deliverables from a risk and compliance perspective.
 - Helps to inform decisions regarding necessary credentials and permissions
 - Provides input to the data transfer process to and from Now Platform
- **User experience engineer/architect** – A highly creative and ergonomically focused technical agent who provides direction and input on usability and look and feel in the system
 - Responsible for maximizing the user experience and look and feel of the application
 - Helps to inform configuration from a user experience lens
 - Participates in process design
 - Background in psychology, design, and technology
- **Program manager** – A coordinator between multiple projects who makes sure the projects benefit each other and align with overall business goals
 - Provides program leadership to execute the platform vision
 - Supports resource planning, release planning, and provides guidance to project build teams
 - Unique from project managers in that they don't directly oversee individual projects
- **Resource manager** – A person who is responsible for capacity planning and resourcing
 - Works closely with demand board and portfolio governance process to ensure resources are available and aligned to new demand
 - Responsible for assigning right people to the right projects at the right time
 - Assists in determining hiring needs
- **Release manager** – Someone who oversees the overall release process to production
 - Works to promote code between environments
 - Resolves any collisions or discrepancies
 - Supports team development activities

- Works closely with the core platform team when upgrades occur, or new applications are put into production
- **Reporting/analytics developer** – Someone who sets overall reporting standards, frequency, and consistencies across various technology solutions
 - Technical resource who partners with business analysts, consumers of the platform, and others to craft meaningful dashboards, reports, and create analytical representation of the data
 - Enforces the governance surrounding all reporting
 - Makes recommendations to improve the use of reporting and analytics to drive outcomes

The takeaway

Our most successful customers maintain and evolve their use of the Now Platform by having the right individuals in place to support it. Make sure to periodically revisit the roles and associated responsibilities on your platform team to fill any gaps before they hinder you from achieving your maximum value from ServiceNow. Remember that there is no one-size-fits-all strategy—your specific requirements for your team will depend on the size of your organization, whether you're augmenting your staff externally, and how you're using ServiceNow capabilities. Reach out to your account executive if you have specific questions about your team's makeup.

Additional resources

- [Success Playbook – Build an internal team of ServiceNow experts and train users](#)
- [Success Playbook – Stand up a ServiceNow Center of Excellence and Innovation](#)
- [Success Checklist – Build an internal team of ServiceNow experts and train users](#)
- [Success Quick Answer – What roles should I include on a ServiceNow platform team?](#)
- [Success Template – ServiceNow platform team charter](#)
- [The journey to certification with ServiceNow](#)
- [Now Creators](#)

Additional resources are also available on our [Customer Success Center](#).

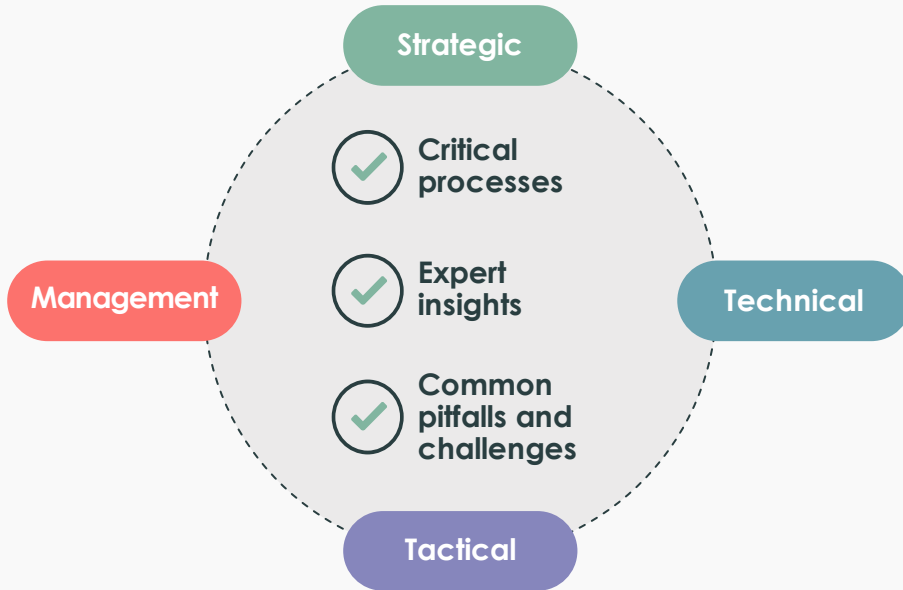
If you have any questions on this topic or you would like to be a contributor to future ServiceNow best practice content, please contact us at best.practices@servicenow.com.

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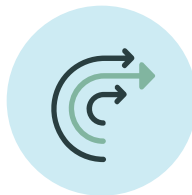


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